

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1960		Project procedures produced as part of Highway Design Manual
1967		District guidelines published for Project Development use of Critical Path Method (CPM) diagrams
1969		Environmental laws passed National Environmental Protection Agency (NEPA) and California Environmental Quality Act (CEQA)
1972		Project Development Procedures Manual (PDPM) issued.
1973		Legislation: Prepare California Transportation Plan and address National Environmental Protection Agency (NEPA) goals Division of Highways became the Department of Transportation (Caltrans)
1976		Develop Project Management Control System (PMCS) A computerized system for managing and controlling highway projects of all sizes from the earliest planning phase to the completion of contract, data in PMCS stored by project.
1980		Person Year and Project Schedule and Cost Analysis (PYPSCAN) adopted. PYPSCAN is the Department's automated project scheduling system, which has been operational since the summer of 1980. PYPSCAN was designed to forecast, report, and monitor Capital Outlay related resources needed to develop and deliver the Department's Multiyear Capital Program. Resources are time, dollars, and personnel.
1987	Sep-87	ASSEMBLY TRANSPORTATION COMMISSION AND LITTLE HOVER COMMISSION HEARING ON STIP PROJECT DELAYS, September 30, 1987: "Caltrans should look to other organizations for new project management techniques to reduce project development and delivery lag times."
1988	Mar-88	Governor issued Executive Order No. D69-88 which created several task forces to recommend ways to improve the Department's ability to deliver projects. - Governor's interagency task force - Local Agency advisory task force - Consulting Engineers task force - Caltrans Delta team - Caltrans performance evaluation system
1988	Apr-88	"DELTA TEAM" STRATEGIES, April 15, 1988 1. Eliminate or streamline project delivery process steps. 2. Eliminate layers of review. Delegate authority to District Management. 3. Accelerate contracting out. 4. Change State and Federal Environmental Requirements. 5. Obtain delegations from FHWA in the Environmental and Design areas. 6. Develop a project management system to monitor the demonstration projects and strategies.
1988	Jun-88	Local Agency task force (part of D69-88) and Consultants recommend "Caltrans Implement Project Management".
1988	Dec-88	Chief Deputy Director conducted satellite videoconference with all Caltrans staff 'Dynamics Of Project Management' described Project Management philosophy and the Departments objectives for its implementation.
1988		Senate Bill 140 (SB140) required Caltrans to produce an annual "Project Delivery Report" and "Project Delivery Plan."
1989	Jan-89	Caltrans Director communicates to District Directors and executive staff decision that Caltrans will implement Project Management.
1989		Formal implementation and initial training in core Project Management concepts by Fluor Daniels
1989	Apr-89	Districts directed to develop 'Project Management Implementation Plan' Primavera and Microsoft Project software selected as Department scheduling tools.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1989	May-89	Project Management guidelines review workshop for Department Management
1989	Jun-89	Project Management Implementation Plans received from Districts. Districts implemented PM in different ways. Project Manager assigned to all major projects and District Project Control Unit established. Authorization for statewide computer hardware and software purchase for Project Management.
1989	Sep-89	District Project Management Implementation Plans approved by Headquarters Project Management Office.
1989	Oct-89	District project control support group formed and Quarterly Delivery Meetings established. <u>Office Project Planning and Design (OPPD)</u> Issued <u>Project Development Workflow Tasks</u> to the Districts
1989		Assembly Bill 471 (AB471) and Senate Bill 300 (SB300) revised the "Project Delivery Report" and required Caltrans to produce an annual "Cost Of Project Development Report."
1990	Jan-90	Project Management training contract approved with Fluor Daniels.
1990	May-90	Adoption of a 19-point Statewide Project Management Implementation Plan: No. 1 - Implementation Plan Approved No. 2 - Implementation Plan Communicated To Staff No. 3 - District Organizational Changes Made No. 4 - Project Managers Designated No. 5 - Project Inventory Prepared No. 6 - Projects Assigned To A Project Manager No. 7 - Project Control Unit Staffed No. 8 - Computer Hardware And Software Procured No. 9 - Project Management Leadership Training Held No. 10- Project Planning And Control Training Held No. 11- Software Training Held No. 12- Project Management Procedures Manual Prepared No. 13- Project Work Plans Prepared No. 14- Critical Path Method Project Schedules Prepared No. 15- Project And District Staffing Requirements Analyzed No. 16- Scope Change And Cost Control Procedures Initiated No. 17- Project Earned Value Analysis Performed No. 18- Project Progress Reporting System Instituted No. 19- Overall District Delivery Plan Progress Report
1990	Jun-90	A Feasibility Study Report (FSR) for the Department's Project Management Database System (PMDBS) was approved. Headquarters Project Management Branch approved and staffed
1990	Sep-90	<u>California Transportation Commission</u> Resolution G-90-21 Five Point Strategy For Program Delivery Reform Project Delivery Quarterly Meetings and Annual Evaluations procedures established. Statewide delivery issues summarized.
90/91	90/91	Personal Computer (PC) hardware and software upgrades completed with inventory. District Project Management evaluations/procedures/policy implemented. Caltrans takeover of Project Management consultant duties – evaluations.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
91/92	91/92	Teleconferencing demonstration and proposal for project delivery meetings. Provided statewide use of generic scheduling techniques
1991		Intermodal Surface Transportation Efficiency Act (ISTEA). The availability of federal gasoline tax revenues and other highway related user tax revenues to support a broader range of transportation related uses. State and Local governments have more flexibility in transportation funding, such as transit, rail modernization, metropolitan transportation planning, operations, and research and technology designed for the 21 st century. 22 positions allocated statewide for Project Management. Engineering News Record report cites 44% cost of engineering on Caltrans projects.
1991	Feb-91	<u>Produce Quarterly Delivery Reports</u> and charts on delivery schedules Developed Statewide Commitment Report 30/60/90
1991	Mar-91	<u>Project Scope, Cost, and Schedule Management Procedures</u> issued by Deputy Directors R..P. Weaver and Martin Kiff.
1991	Apr-91	Statewide Project Management Questionnaire by the Project Management Office.
1991	Jun-91	Statewide Peer Review Questionnaire by Caltrans and Consultant (Bechtel) Project Engineer Academy presentation on Project Management.
1991	Jul-91	<u>Project Management Procedures Manual</u> developed and distributed
1991	Sep-91	Initiated Division Newsletter articles
1991	Nov-91	Caltrans “Stimulates The Economy” \$500 Million in expedited projects proposed.
1991	Dec-91	First Project Management Academy conducted and academy training manual prepared. Additional academies held over next 3 years.
1992	Feb-92	Implement Project Manager authority from project inception to completion of construction and project close out. Director ‘s letter on support of Project Management.
1992	Feb-92	Analyzing mainframe access software – Attachmate.
1992	Mar-92	Developed Project Schedule and Cost Analysis (PYPSCAN)/Primavera interface procedures and training
1992	Apr-92	Project Management Data Base System (PMDBS) contract signed with Teradata Corporation and user team established.. Project Cost And Scheduling Tracking Report initiated statewide introducing Earned Value concept.
1992	May-92	<u>Project Scope, Cost, and Schedule Management Procedures</u> revised May 15, 1992 signed by the Director, JAMES W. VAN LOBEN SELS. Supercedes March 15, 1991 memo signed by Deputy Director, R. P. Weaver.
1992	Jun-92	Caltrans Director notified Department of impending Management audit proposed by Senate Concurrent Resolution No. 72. The study is to be done by Stanford Research Institute (SRI). SCR72 Bergeson Bill: (Sep 92) Management Audit Of Caltrans and Its Organizational Structure and Practices.
1992	Jul-92	Initiate work on Project Management database system Feasibility Study Report (FSR). Project was terminated Feb 93 under mutual agreement with vendor. <u>California Transportation Commission (CTC)</u> Passed Resolution G-92-12 Dept Objectives: 90% Delivery for Ready To List dates (RTL) and 100% Delivery for Dollars programmed.
1992	Aug-92	Published <u>Project Management Control System (PMCS) User Manual</u> ,
1992	Sep-92	<u>Senate Concurrent Resolution No. 72 (SCR72)</u> Bergeson “This measure would make legislative findings regarding the need for a study of the organizational structure and management of the Department of Transportation, in light of the state’s changing transportation needs. The measure would direct the Legislative Analyst to contract with a private consulting firm to conduct a management audit of the department, as specified, and make recommendations to the Governor and Legislature for improving the efficiency of the department.”

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1992	Oct-92	<u>"Project Management Peer Review"</u> initiated by Bechtel, Army Corp of Engineers, and US Navy.
1992	Nov-92	<u>Peer Review Questionnaire</u> - Bechtel, Army Corp of Engineers, and US Navy.
1992	Dec-92	Project Management Data Base System (PMDBS) termination of contract - NCR / TERRADATA.
1993	Jan-93	<p><u>1993 Peer Review Report</u> "Project Management Peer Review" by Bechtel Corporation, U.S. Army Corps of Engineers, and U.S. Department of the Navy recommends standardization of process and tools. Major recommendations concerned with Project Manager and Functional Manager roles and responsibilities, Project Manager authority, organization, Project Management procedures, communications, training and forums, Management support and employee recognition, and tools.</p> <p><u>"CONCERNS" EXPRESSED BY THE CALTRANS PROJECT MANAGEMENT PEER REVIEW, January, 1993</u></p> <ul style="list-style-type: none"> • Lack of realistic goals and objectives. The definition of project management does not properly recognize the constraints placed upon the employee in civil service. • Lack of communication. The specific roles and responsibilities of all district employees in the project management process are not completely and uniformly understood. • Lack of consistent management support. Each district has different agendas for what they expect of Project Managers and Control Units, and how they hold them accountable for their actions. • Lack of authority. HQ micro-manages (over administers) district activity to such an extent that district accountability and responsibility is diminished. Consequently, the districts have very little authority to allocate to Project Managers. • Lack of tools. Project Managers don't have sufficient tools or procedures to know how their projects are progressing against plan except at gross summary levels. Functional Managers have no way of knowing what their workload is or how to plan for it.
1993	Feb-93	Caltrans initiates 9 month task force comprised of District and Headquarters representatives to review and develop strategy for implementing findings of the 1993 Peer Review Report by the Bechtel Corporation, the United States Army Corps of Engineers and the U.S. Department of the Navy.
1993	Mar-93	SRI International – Technical Proposal <u>Prepared for the California Legislature, Legislative Analyst's Office by SRI International, Gabriel Roche, Inc., and Vernazza Wolfe Associates, Inc.</u>
1993	Jun-93	Memo dated 6/24/93 from Deputy Director, R.P. Weaver defining the Project Management effort through the Construction phase, Post Award duties.
1993	Aug-93	SRI International – First Preliminary Report <u>Prepared for the California Legislature, Legislative Analyst's Office by SRI International, Gabriel Roche, Inc., and Vernazza Wolfe Associates, Inc.</u>
1993	Sep-93	<p>SRI International Second Preliminary Report <u>Prepared for the California Legislature, Legislative Analyst's Office by SRI International, Gabriel Roche, Inc., and Vernazza Wolfe Associates, Inc</u></p> <p>Project Management Data Warehouse (PMDW) came on-line. This database system links information from various databases such as Project Management Control System (PMCS), Transportation Accounting And Management System (TRAMS), and Office Engineer (OE) databases, providing coordinated access to key information too more effectively manage projects.</p>
1993	Oct-93	Stanford Research Institute (SRI) reported on the "Evaluation Of The Organizational Structure And Management Practices Of The California Department Of Transportation." The report recommends standard processes, tools, Project Management authority, etc.
1993	Nov-93	SRI International – Draft Final Report <u>Prepared for the California Legislature, Legislative Analyst's Office by SRI International, Gabriel Roche, Inc., and Vernazza Wolfe Associates, Inc</u>

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1993	Oct93-Feb94	A Project Management task force was formed to develop requirements for Enterprise Wide Project Management Software. The task force reviewed various products and selected eXpert Project Manager eXpert Project Manager (XPM)) as the Department's standard scheduling tool
1993	Dec-93	Caltrans Implementation Plan.(pdf) Caltrans task force publishes “Revisions to Improve Project Management in Caltrans.” Caltrans review and recommendations on the “Project Management Peer Review” prepared by the Bechtel Corporation, U.S. Army Corps of Engineers and U.S. Department of the Navy (see Jan 1993)
1994	Jan-94	SRI International Revised Draft Final Report Volume II Hewlett Packard demonstrated (XPM)) capabilities and task force recommendation to implement eXpert Project Management (XPM)) statewide.
1994	Feb-94	Stanford Research Institute (SRI) International Final Report Volume II (Detailed Findings, Options, and Recommendations) “Evaluation of the Organizational Structure and Management Practices of the California Department of Transportation”- 72 Recommendations to improve Caltrans efficiency and effectiveness prepared for the California Legislature, Legislative Analyst’s Office by SRI International, Gabriel Roche, Inc., and Vernazza Wolfe Associates, Inc. Established the Seismic Retrofit Program monitoring and control process within the Corporate Project Management Program.
1994	Mar-94	Developed Engineering Cost Reporting (ECR) to improve total project cost tracking and project inventory.
1994	Apr-94	Developed agency bar charts for Seismic Retrofit projects.
1994	May94-Sep94	Caltrans Project Management re-engineering team was formed. It defined standard Project Management process and approach, roles and responsibilities and organizational structure.
1994	Jun-94	eXpert Project Manager (XPM)) Pilot in District 7
1994	Jul-94	Caltrans implemented standard capital outlay support Work Breakdown Structure (WBS) and Resource Breakdown Structure (RBS) . The WBS, which breaks down a project into a hierarchy of logical grouping of activities, and the RBS, a hierarchy of assigned resources, establish set of consistent planning tools for Capital Outlay Projects, which allow planned work to be matched against actual expenditures and progress. Orientations seminars / workshops were held to present an overview of Project Management processes and tools. Caltrans implemented a re-organization plan to support Project Management concepts and processes. Created the Corporate Project Management Program (PMP) (formerly known as Engineering Management Division). The “Model District Organization” was adopted by creating a District Division Chief for Program / Project Management in each District, commonly referred to as Single Focal Point (SFP) , to focus on project delivery instead of functional activities. This helps to increase the perceived authority of the Project Manager. Established Quarterly Project Management Forums for the SFP’S to discuss Project Management and delivery issues. Initiated Project Management improvement efforts. Project Management implementation efforts will shift focus from corporate and District executive team to institutionalize Project Management organization, process, and tools eXpert Project Manager (XPM), Work Breakdown Structure (WBS)/Resource Breakdown Structure (RBS), etc. Appointed corporate and Statewide Project Management Improvement Team (PMIT) which holds quarterly meetings to address and resolve Project Management Implementation / Improvement Issues.
1994	Sep-94	War Room Report (Graphic and Spreadsheet) developed for Deputy Director to provide status of project delivery for programmed projects.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1994	Oct-94	<p><u>Directors Memo “Meeting the Challenge to Change”</u> An inventory of actions taken, under way, and planned for the Transformation of Caltrans. Five Strategies: Fundamentally to Transform Caltrans from what it was to what it must be in order to serve the already changed needs of the people and business of California, To organize and manage by business process, To reinforce and facilitate delegation of authority and responsibility to the lowest practical level, and also to build in the mechanisms for accountability and assistance to ensure top performance, To reduce the cost of doing business while maintaining quality, To focus on the customer - the people of California.</p> <p><u>Caltrans releases 1994 Strategic Plan. (pdf)</u> This includes: Goal # 2, Caltrans improves delivery of all transportation services, Goal #5, Caltrans is a good steward of transportation resources while reducing the cost of doing business, Objective 2-05, Implement True Project Management, Objective 5-01, Improve Cost and Schedule Control Of Capital Outlay Support Resources.</p>
1994	Oct94-May-95	Install eXpert Project Manager (XPM)) software in remaining Districts and ESC, provide XPM training
1994	Oct-94	Initial Single Focal Point (SFP) forum meeting and Charter establishment. Conduct forum meetings quarterly to discuss and resolve Project Management issues. Appoint corporate Project Management Improvement Team (PMIT) to guide Project Management Implementation
1994	Nov-94	Caltrans conducts eXpert Project Manager (XPM)) Administrator workshop
1994		Legislature passes Senate Bill (SB1565/94 - Project Support Budget legislation - that adds Government Code 14529(g) “The state transportation improvement program shall identify and include the cost of project development, including, but not limited to, design and estimating costs and the costs of environmental studies.”
1995	Jan-95	<p><u>1995 Project Management Handbook</u>, first Edition of the Project Management Handbook published and distributed statewide.</p> <p>Deputy Directive 34 issued for “Program/Project Management for Capital Outlay” by Deputy Director, R. P. Weaver, effective 1/3/95.</p>
1995	May-95	<p>Timesheet Reporting System (TRS) on-line electronic system was introduced with a pilot project in District 3 and Headquarters Offices to improve timeliness of project cost reporting. Hard edits were established in 1995/96 to increase accuracy of timesheet data.</p> <p><u>Project Management Data Warehouse Handbook Table and Field Descriptions May95 Release 2.0 (pdf)</u></p>
1995	Jun-95	California Transportation Commission (CTC) resolution G-95-08 amending resolution G-12 Capital Outlay Support (COS) Management reports developed.
1995	Jul-95	<p>Project Management using (XPM))" manual.</p> <p><u>Work Breakdown Structure (WBS) Release 2.0 (pdf)</u></p> <p>Initiate Project Management improvement efforts. Project Management focus from Corporate and District executive team to institutionalize Project Management organization, process, eXpert Project Manager (XPM), Work Breakdown Structure (WBS), Resource Breakdown Structure (RBS), etc. Established District video conferences for quarterly project delivery</p> <p>Caltrans creates Northern Region (Districts 1, 2 and 3) and Central Region (District 5, 6, 9 and 10). The intent is to better manage Capital Outlay Support Program workload fluctuations by merging and creating regional resource pools. Caltrans created Service Centers, including Engineering Service Center (ESC). (ESC includes Structures, Office Of Office Engineers, Office Of Engineering Technology and Transportation Laboratory.) The intent is to streamline service operations at corporate offices.</p>
1995	Nov-95	Drafted Capital Outlay Support (COS) performance measures (Gov. Code 14529.16), and developed reporting criteria for them. Contracted with the survey research center of California State University at Chico to assist in developing a quality performance measure.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
		<u>1995 Report to the Legislature on Capital Support Performance Measures (pdf)</u> <u>1995-96 Performance Report (pdf)</u> <u>1996-97 Performance Report (pdf)</u> <u>1997-98 Performance Report (pdf)</u>
1996		Project Management Program (PMP) embraced the <u>Project Management Body Of Knowledge (PMBOK)</u> regarding Project Management that has been compiled by the profession, through the Project Management Institute (PMI) to guide the Department's continuous improvement effort in Project Management. We have used their concepts that emphasize the interaction of people, process, and tools in effective Project Management to evaluate our processes, target improvements, and develop education programs to raise awareness.
1996	Feb-96	Caltrans Director approved the Regionalization of Capital Outlay Support activities: Right-of-Way, Environmental, Design, Construction and Misc. Engineering Support. North Region Districts 1, 2, and 3; Central Region Districts 5, 6, 9, and 10.
1996	Mar-96	Stanford Research Institute (SRI) follow-up report to Legislature on Caltrans progress on Implementing Feb 94 Recommendations of SRI.
1996	Mar-96	Project Support Budgets established to meet requirements of Senate Bill 1565/94 (see 1994). Project Management Program (PMP) developed the Capital Outlay Support (COS) Budget Development and Management" proposal following the Business, Transportation, and Housing (BT&H) Supplemental Report of The 1996 Budget Act. The proposal recommends using the project support budgets (output of project workplans) for Capital Outlay Support (COS) workload development.
1996	May-96	<u>Guide to Caltrans Capital Outlay Support Work Breakdown Structure (WBS) Release 3.0 (pdf),</u>
1996	Jun-96	<u>Workload Estimating Norms (WEN)</u> task groups develop norms for Work Breakdown Structure (WBS) Level 5 activities. The Management-consulting firm of CH2M-Hill was hired for an independent evaluation of the process used in the WEN tool development. Their February 1997 conclusion was that the WEN tool is a good first step toward developing project-level workload estimating norms. This tool is critical to getting the best estimates of workload at the initial stages of projects. Ch2M Hill provided four recommendations, each of which the Department has developed an action plan for. The WEN tool will provide establishment of norms at project specific Work Breakdown Structure (WBS) levels. Absent this tool, Project Schedule and Cost Analysis (PYPSCAN) was used as a program-wide workload norm during the FY 1997-98 budget process, providing a reality check of the results of the project support budget process.
1996	Jul-96	Initiate Peer review of Capital Outlay Support (COS) budget process by CH2M-Hill, Psomas, Arizona Department of Transportation (DOT)
1996	Sep-96	<u>1996 Peer Review Report</u> Final report to Legislature by CH2M-Hill, Psomas, and Arizona Department of Transportation (DOT) Workload Development Peer Review_The review determined that the Department has a good plan and is underway to perform "Product Driven Zero Based Budgeting". The report identified that Project Management concepts are being implemented. The report also recommended improvements in areas concerning: fully integrated and comprehensive Project Management systems to support Project Management procedures, Project Management Improvement Plan implementation, project delivery efficiencies, allocation of resources, and performance measures and incentives. "MAJOR BARRIERS" IDENTIFIED BY THE CALTRANS WORKLOAD DEVELOPMENT PEER REVIEW, September 16, 1996. <ol style="list-style-type: none"> 1. The unavailability of a data based project management reporting system anchored by XPM. 2. The lack of the use of flexible resources within the purview of the Project Manager. 3. The significant culture change required from Functional Managers in determining resource needs by project, and in accepting the Project Managers' leadership role. 4. The ingrained bureaucratic cultural resistance to a flattened organizational culture centered on project delivery by Project Managers. 5. The culture change necessary at Caltrans to eliminate micro management of individual projects by Headquarters.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1996	Nov96-Mar97	Project support budget task force - workplans, market Project Management, develop performance measures, project support budget development - eXpert Project Manager (XPM)) work plans for 97/98 and 98/99, load labor expenditures from Time Reporting System (TRS) to Project Schedule and Control System (PSCS)
1996	Nov-96	Directors Office Memo dated 11/20/96 on <u>"Policy Guidelines on Implementing One Hat Project Management"</u> The Department issued single hat Project Manager's policy with implementation date of July 1997, establishing the one hat Project Manager as sole point of contact for projects and seeks to expand their authority by increasing the available time for managers to work on projects. This rule also ensures equitable allocation of resources to projects.
1997		<p>Project Management Program (PMP) implemented a reorganization plan to separate Project Management improvement functions from the operational (day to day) activities. <u>Caltrans Functional Organization Chart Oct 97</u></p> <p>Participated in 10-state mid-west Project Management consortium for the second year in a row. Major goals are to exchange ideas and establish industry "best practices" in the Project Management arena.</p> <p>Developed a process where each project delivery team estimated workload and support resource needs for their projects on 96% of all major projects, which when input into eXpert Project Manager (XPM)) and compiled provided the basis for the project specific workload in the FY 1998-99 Capital Outlay Support Budget. Project workplans (1400) entered into for 97/98 statewide rollup Capital Outlay Support (COS) budget.</p> <p>Consistent with the Department's continuous improvement focus, other improvements are being pursued. Major improvements that are being developed or implementation is underway are: engaged in a <u>Business Process Review</u> to improve Project Management, thus further the benefits and efficiency that Project Management concepts bring to our product and customer satisfaction. Continuing to focus on changing Department cultural attitudes regarding Project Management. Developing training programs to focus on interpersonal skills necessary for effective Project Management. Stressing customer/stakeholder involvement in the project delivery process and the importance of empowering the project team, lead by the Project Manager, to address project and customer needs.</p>
1997	Jan-97	Published <u>"Project Resource Data Management Guide" 1996-97 edition</u>
1997	Feb-97	Introduced a one-day "Project Management overview", an ongoing education program, to clarify roles and responsibilities of Project Managers and Functional Managers.
1997	Mar-97	<u>Caltrans 1996 Action Plan</u> Caltrans response to the Peer Review by Robert Bein, William Frost and Associates, CH2M Hill, Psomas and Associates, and Arizona Department of Transportation (Sep96)
1997	Jun-97	Department begins using the Project Schedule and Control System (PSCS) which incorporates the project workplan information in eXpert Project Manager (XPM)) regarding schedules and planned resource needs and compare to actual resource usage in the Department's Timesheet Reporting System (TRS).
1997	Sep-97	<u>Publish the Project Management Handbook</u> Second Edition
1997	Oct-97	<u>Department of Transportation - Draft Closeout Report for Stanford Research Institute (SRI)</u> <u>Project Schedule Control System (PSCS) eXpert Project Manager (XPM)/TRS Comparison Reports – User's Manual</u> <u>Senate Bill 45 (SB45) Chaptered.</u> Simplified the process whereby transportation projects are funded and better establish responsibility and accountability for project delivery.

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
		Statute becomes effective Jan98: It transforms the STIP from a project delivery document to a resources Management document. Caltrans will program only those projects to be funded through the Interregional Improvement Program and recommend highway improvement projects to be funded through the Regional Improvement Funds. The Department remains responsible for the planning, design, construction, maintenance and operation of the State Highway System. Publish " Caltrans Guide to Resource Breakdown Structure (RBS) ", Release 3.0, October 1997 Publish " Project Schedule Control System (PSCS) XPM/TRS Comparison Reports ". Users Manual, October 1997.
1997	Nov-97	Published " Guide to Caltrans Capital Support Management Reports " 1997-98 edition Final Report published on the Caltrans " Business Process Review. "
1997	Dec-97	1997 Progress Report Caltrans progress report on the Peer Review by Robert Bein, William Frost and Associates, CH2M Hill, Psomas and Associates, and Arizona Department of Transportation in September 1996.
1998	Apr-98	Caltrans received Corporate Membership in the Project Management Institute (PMI) . Caltrans Corporate Strategic Plan issued "Managing For Results" to integrate Project Management.
1998	May-98	Transportation Equity Act (TEA-21) On May 22, 1998, the Congress passed H.R. 2400, the Transportation Equity Act for the 21st Century (TEA-21) authorizing highway, highway safety, transit and other surface transportation programs for the next 6 years.
1998	Jun-98	Developed analysis tool for Districts to develop support estimates equivalent to Senate Bill 45 categories. Capital Outlay Support Budget Analysis Tool (COSBAT). 1998 Historical Cost Analysis of Capital Outlay Support.
1998	Jul-98	Developed Corporate Project Management Operation Plan. 1998-99 budget includes \$1,172,000 for training of capital project personnel. Project Management Data Warehouse Handbook Release 2.4
1998	Aug-98	Developed "Workload Estimating Norms" (WEN), with standard deviations for project support budgets. 1998 Historical Analysis of Capital Outlay Support Caltrans Guide To Resource Breakdown Structure (RBS) Release 3.1
1998	Sep-98	Develop a Work Breakdown Structure (WBS) for Project Management Improvement projects.
1999	Sep-98	Publish the 1998 Capital Projects Business Plan .
1998	Oct-98	The Project Management Procedures Manual, dated July 1991, is rescinded.
1998	Oct-98	54 project management personnel attend the Project Management Institute (PMI) Seminar in Long Beach , CA in October 1998.
1998	Nov-98	Developed work results reporting process and standards and place Quarterly Financial Reports on the web site.
1998	Dec-98	Senate Bill 45 Quarterly Report implemented. 1998 Progress Report Caltrans provided progress report on Peer Review by Robert Bein, William Frost and Associates, CH2M Hill, Psomas and Associates, and Arizona Department of Transportation (Sep96) Initiated a project to develop a plan for the long-term training of all Capital Project personnel (9,400 employees in 1998-99 budget).
1999	Mar-99	Issued Project Management Directive 99-01 Project Management Definitions.
1999	Mar-99	Issued Project Management Directive 99-03 Project Management Roles.
1999	Mar-99	Issued Project Management Directive 99-04 Capital Project Operational Plans.
1999	Apr-99	Publish the Project Management Handbook Third Edition

PROJECT MANAGEMENT CHRONOLOGY

INTERNET

1960-2000

YEAR	MONTH	DESCRIPTION
1999	May-99	Issued <u>Project Management Directive 99-02</u> Project Identification.
1999	May-99	<u>Revised Work Breakdown Structure</u> (WBS4.0 May 1999) for 98/99 FY to deal with Program Accountability at Caltrans (PACT) and realignments of R/W Property Management & Excess Land Sales.
1999	Jun-99	Selected alternatives for Capital Project Initiation, Cost and Schedule Management and provided a Project Management framework, function hierarchy, process flow diagrams, data requirements, and glossary for Capital Outlay Support in Designer 2000.
1999	Jun-99	<u>Instructions</u> issued for reimbursement of Project Management Professional (PMP) Certification costs.
1999	Jun-99	STATEWIDE PROJECT MANGAMENT IMPROVEMENT TEAM ADOPTS A 5-POINT VISION, June 8, 1999 1. Integrated and standardized project management database system. 2. Continuous and adaptable project management training program. 3. Functional areas use workplans to plan, guide execution and status their work. 4. Caltrans is a recognized leader in project delivery quality (ISO 9000). 5. Project manager career path.
1999	Jul-99	Using funds in 1998-99 budget (see July 1998), Caltrans provided over 400,000 hours of training to its Capital Outlay Support employees.
1999	Jul-99	Developed and updated interrelated tables from Project Management Control System (PMCS), eXpert Project Manager (XPM), California Transportation Improvement Program System (CTIPS) and the Operations Plan for a project cost and schedule management system to guide development of a quarterly reporting system.
1999	Jul-99	Developed a prototype visual fox pro system that allows the operations plan manager to manage the operations plan. The system will need to include all of the functionality to add and remove projects, maintain a baseline, and manage the linkages to program project counterparts as well as maintain links to eXpert Project Manager (XPM) and Project Management Control System (PMCS). This system should include input procedures and processes to maintain PMCS data as well. One result will be data that can be warehoused for ease of access to internal and external customers.
1999	Sep-99	Caltrans creates two Project Management Coordinators positions to improve communication between Headquarters and the District's in regards to Capital delivery expectations and project management best practices.
1999	Dec-99	Issued <u>Project Management Directive 99-05</u> Planning, producing and charging by Phase.
1999	Dec-99	35 subject matter experts participated in a one-week workshop to design a skill development plan for the entire 10,000-person capital project workforce.
2000	Jan-00	Database coordinated for Capital Outlay Support (COS) resource information between Programming and Project Management information systems. Capital Outlay Support database developed for workload and earned value.